

District Evaluators: Site Visit Caseloads Quick Reference Card

CIITS: Managing Site Visit Caseloads

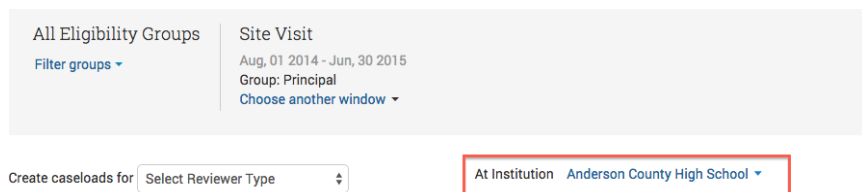
Users permitted with Caseload Manager (included in the Leadership role), can use the Caseload Manager tool to match Principals with their evaluator for Site Visits. Users with the "View Leadership Effectiveness Data" role (typically principals, superintendents, and superintendent designees) can be selected as reviewers/evaluators for Principal Site Visits.

Create an Observation Caseload

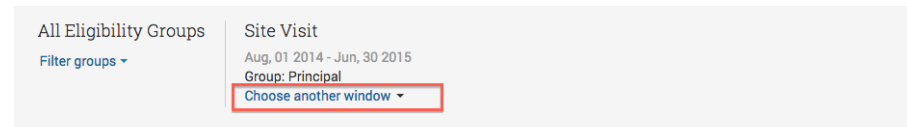
1. Roll your cursor over Educator Development on the navigation bar and click **Caseload Manager**



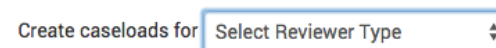
2. If you need to change the institution to view Principals at a different school (only available if you have permissions at multiple institutions), click the institution name drop-down:



3. Select the window named **Site Visit**. To select a window click **Choose another window**



4. Use the **Reviewer Type** drop-down to select which user type will be conducting the Site Visit (Superintendent, Superintendent Designee, or Principal)



5. Click **Add New Reviewer** and type the last name, first name of the Evaluator (the user must have the View Leadership Effectiveness Data role)

Reviewers

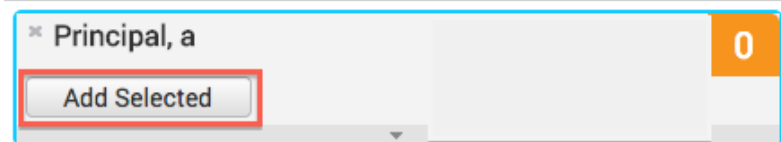


6. In the menu on the right, select (check) the principal(s) that you would like to add to this evaluator's caseload.

Educators

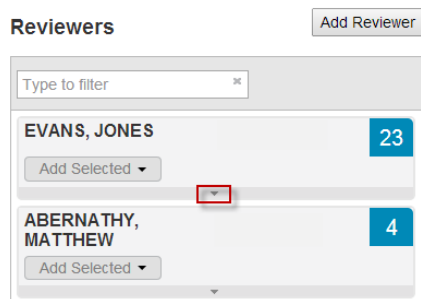
Type to filter		
<input type="checkbox"/> Name	Observers	ID #
<input checked="" type="checkbox"/> ADKINS, MARY	0	
<input type="checkbox"/> ATHA, EDITH	0	
<input checked="" type="checkbox"/> BARKS, AMY	2	
<input type="checkbox"/> BARNES, ASHLEY	0	
<input type="checkbox"/> BUCKMAN, STEPHANIE	1	
<input checked="" type="checkbox"/> COSLOW, ASHLEY	0	
<input type="checkbox"/> CURRY, KAITLYN	0	

7. Once you have selected/checked all of the principals for this reviewer, click **Add Selected** to add them to the caseload



Removing principals from a caseload

1. Expand the reviewer screen to display the Observers full caseload



2. Click the delete icon (trashcan) next to the name you would like to remove from the caseload

